



Germany

NATO Country Assessment —TIER TWO—

BURDEN SHARING • GROWING COURAGE & FORCE • CAPABILITY CONCERNS



JULY 2026



TIER 2

Average Ally



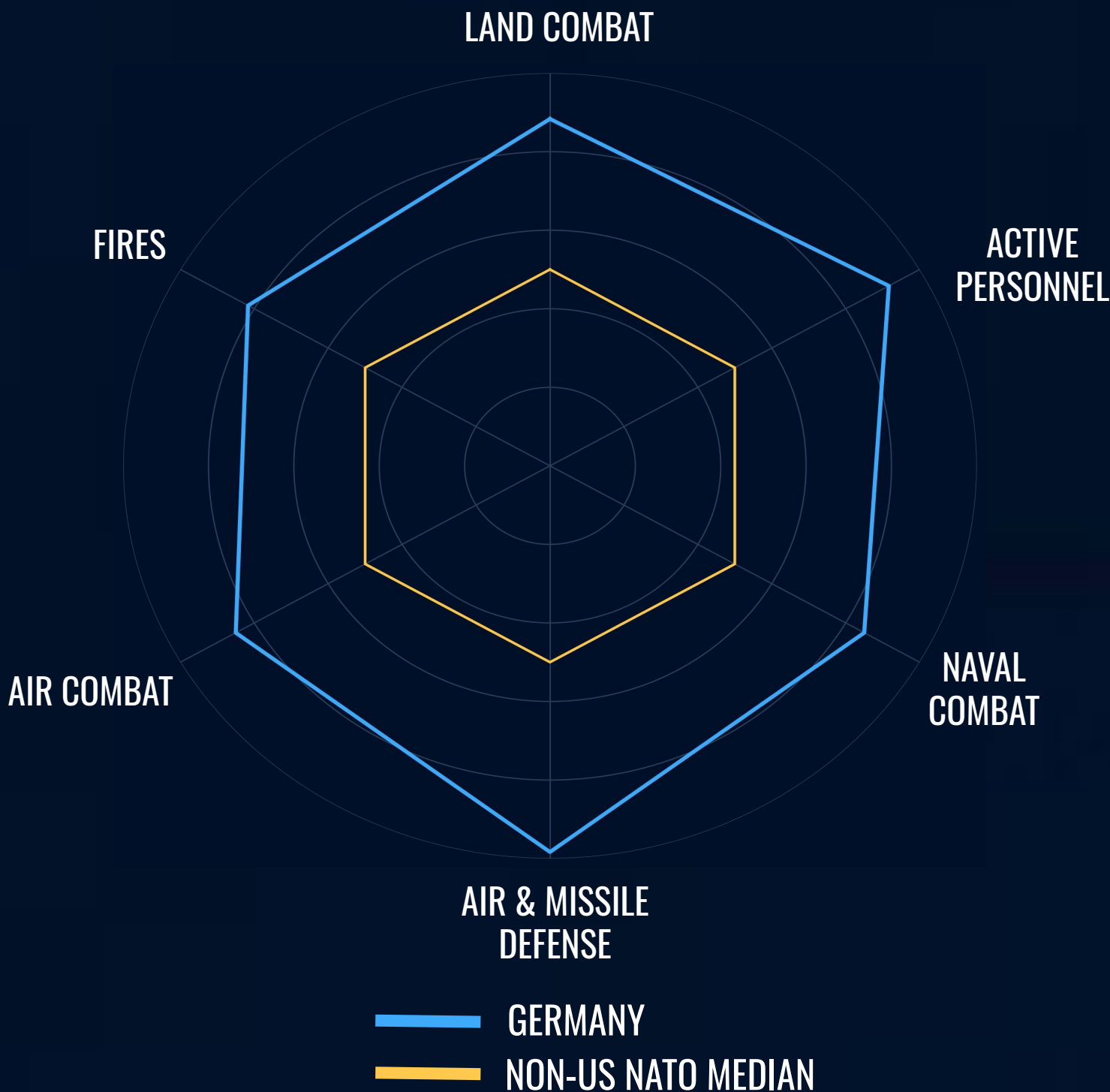
AT A GLANCE

Toplines

- **Internalizing the US's Vision on Burden-Sharing:** Germany has made the most dramatic strategic reversal of any major European ally, going from 1.49% of GDP in 2022 to 2.4% in 2025 and exempting defense from its constitutional debt brake.
- **Abandoning Caution for Leadership on Ukraine Support:** Germany is Ukraine's largest absolute military supporter in Europe at €25B allocated, has backed every EU sanctions package through the 20th, and the Merz government has actively pushed for stronger use of frozen Russian assets.
- **Large Army, Low Capability:** Despite being Europe's largest defense spender in absolute terms, Germany ranks 28th out of 32 NATO allies on equipment share, signaling a military lacking meaningful capability.



FORCE STRUCTURE AT A GLANCE



This radar chart compares a country's force structure to the Non-US NATO median (data from IISS's 2026 Military Balance) across six capability areas: Land Combat (tanks, IFVs), Active Personnel (total active-duty troops), Naval Combat (submarines, destroyers/frigates/corvettes), Air & Missile Defense (long/medium-range SAM systems), Air Combat (4th-gen+ combat aircraft), and Fires (artillery, rocket launchers). Scores are weighted, with modern platforms counted fully and legacy platforms counted at reduced weight.

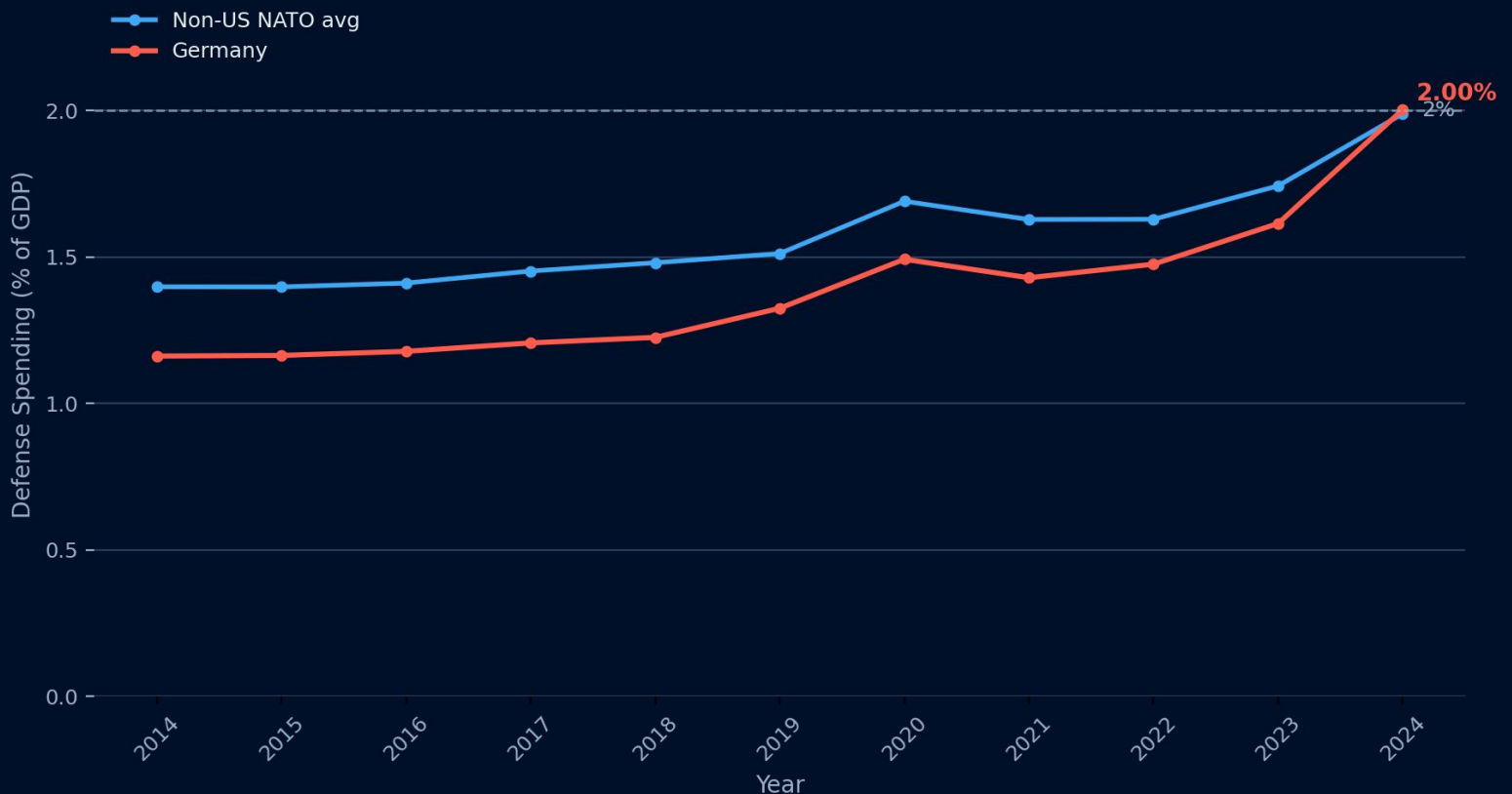


MILITARY CONTRIBUTIONS

Defense Spending Level

Germany has undergone a significant [defense spending](#) reversal in recent years. After decades of deliberate underinvestment (spending just 1.49% of GDP in 2022) Germany crossed 2% for the first time in 2024 and will reach an estimated [2.4%](#) in 2025. This translates into roughly \$114B, making it Europe's largest absolute defense spender at 19% of total European defense expenditure. The tension is that years of underinvestment created capability deficits that spending alone cannot quickly reverse. For a country of Germany's size, industrial capacity, and geographic centrality to NATO's eastern front, the gap between absolute volume and proportional commitment remains the central assessment challenge.

Germany — Defense Spending as % of GDP, 2014-2024

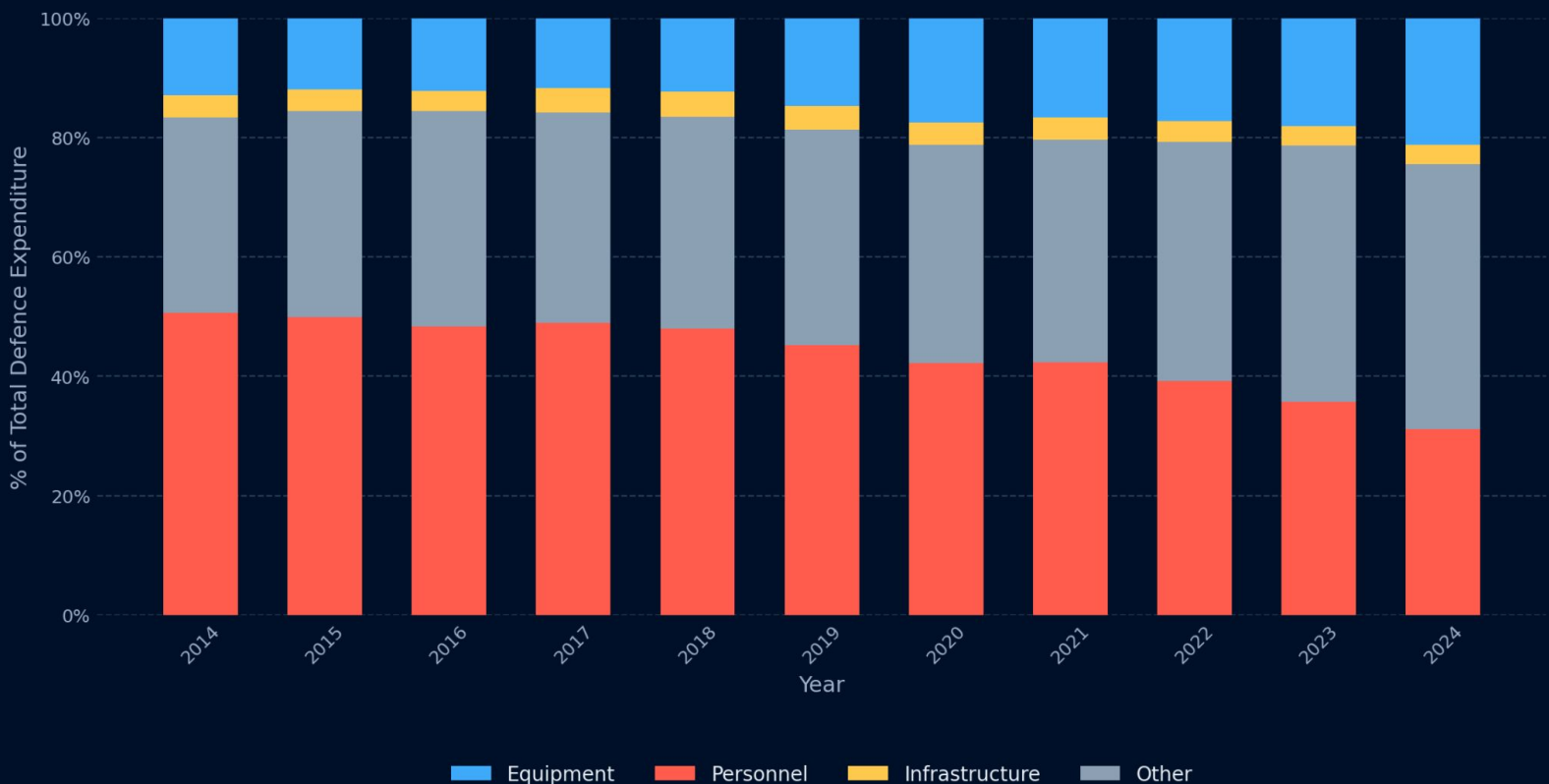


MILITARY CONTRIBUTIONS

Equipment Share

Germany's [equipment share](#) crossed NATO's 20% benchmark for the first time in 2024. Personnel costs falling from roughly 50% to 32%, with equipment and "Other" procurement categories rising as the \$108B Bundeswehr special fund flows into hardware. The progress is real but the ranking is not: at just over 20%, Germany sits 28th out of 32 NATO allies on equipment share. For Europe's largest absolute defense spender and a country hosting more US military infrastructure than any other ally, barely clearing a benchmark most allies crossed years ago is an underwhelming result. The direction is right; the scale is not yet commensurate with Germany's strategic weight.

Germany — Defence Expenditure by Category, 2014-2024

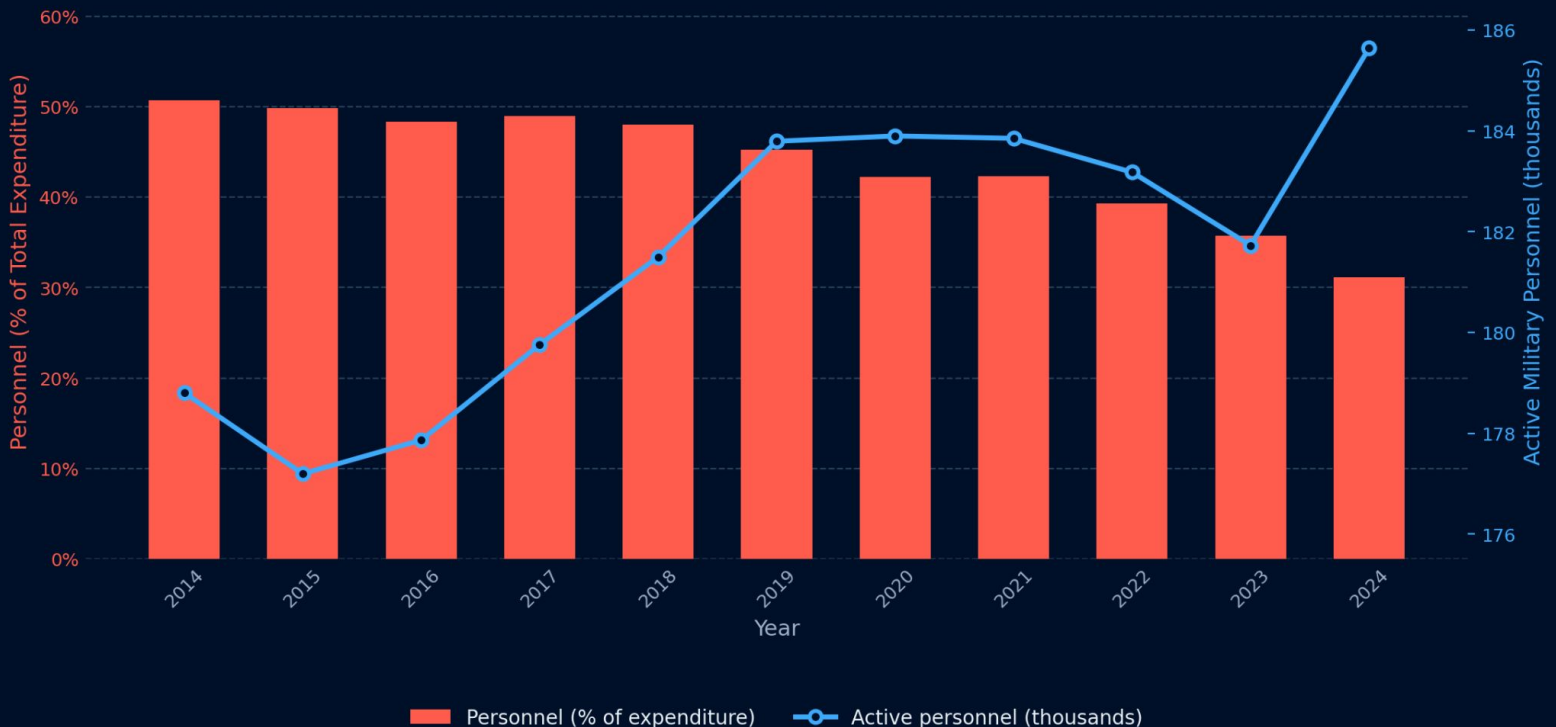


MILITARY CONTRIBUTIONS

Manpower & Recruitment

Germany's [spending quality](#) picture reflects the structural legacy of a military built around personnel and institutional overhead rather than deployable capability. Personnel costs have historically consumed a disproportionate share of the defense budget, and the German armed forces have simultaneously struggled to recruit enough soldiers to meet their own targets. Active personnel grew modestly from 183,179 in 2022 to 186,413 in 2025, well short of the ministry's stated expansion goals. The [2025 Parliamentary Commissioner's report](#) cited over 20,000 vacant positions and an armed forces described as "aging and shrinking." The combination of high personnel costs and a recruitment shortfall means Germany is paying significantly for a force that is neither growing nor particularly ready.

Germany — Personnel Cost Share & Active Personnel, 2014-2024



MILITARY CONTRIBUTIONS

Capability Modernization

Germany's [modernization](#) has genuine strengths and serious weaknesses. The clear strength is air defense: roughly 70 Patriot PAC-3 launchers (the largest Patriot fleet in Europe) plus three IRIS-T SLM batteries, with a European Patriot missile manufacturing facility beginning production in 2027. On combat aircraft, 35 F-35As were contracted in 2022 for roughly \$8.4B, with first deliveries in 2026 replacing the Tornado in NATO's nuclear-sharing role. The weaknesses are significant. Armor production is running at roughly 33 Leopard 2A8 tanks per year through 2030—a rate at which rebuilding German armor to 2004 levels would take decades. The Future Combat Air System was [formally cancelled](#) on June 8, 2026, after nine years and repeated failed attempts to resolve intellectual property and workshare disputes between Dassault and Airbus—leaving both Germany and France without a clear sixth-generation fighter pathway. Germany is modernizing, but not fast enough or at sufficient scale for Europe's largest defense spender.



MILITARY CONTRIBUTIONS

Force Posture

Germany's force posture has two dimensions: forward deployment and rear-area hosting. On the forward side, Germany [activated Panzerbrigade 45](#) in Lithuania in April 2025—the first permanent German brigade-sized foreign deployment in postwar history—with full operational capability of roughly 4,800 soldiers planned for 2027. Germany has [led NATO's eFP](#) battlegroup in Lithuania since 2017 and maintains Patriot batteries in Poland. On hosting, Germany is NATO Europe's indispensable rear-area hub: [roughly 35,000 US troops](#) are stationed there, including EUCOM and AFRICOM headquarters at Stuttgart, US Army Europe and Africa at Wiesbaden, and Ramstein Air Base—infrastructure that supports not just European operations but US military activity across the Atlantic, Africa, and the Middle East.



MILITARY CONTRIBUTIONS

Industrial Base

Germany's [defense industrial base](#) is one of the most strategically important in Europe. Rheinmetall has scaled 155mm artillery ammunition production from 70,000 rounds annually to 1.1 million, with a new plant [targeting 1.5 million rounds](#) per year by 2028. This is the single most important European contribution to NATO's munitions sustainment problem outside the United States. Military truck production grew from 600 to 4,500 units annually. KNDS Deutschland has restarted new-build Leopard 2 production after a 33-year gap. A four-nation consortium placed an order for 1,000 PAC-2 GEM-T missiles in April 2024 with Germany establishing the production facility. For raw materials, Germany's chemical and metals industrial base underpins much of European munitions and precision components production. The liability is that several critical multilateral programs remain stalled, representing a genuine gap in European defense industrial coordination that Germany's scale should be able to close.



STRATEGIC ALIGNMENT

Declared Posture

Germany's strategic posture is anchored in a cluster of documents produced since 2022 that collectively represent the most comprehensive reorientation of German national security thinking in the postwar period. The [2023 National Security Strategy](#) identifies Russia as the most serious threat to Europe and anchors German security firmly in NATO. The Merz government has pledged to build the Bundeswehr into [Europe's strongest conventional army](#), and defense spending above 1% of GDP has been exempted from Germany's constitutional debt brake. On China, Germany's [2023 China Strategy](#) hedges by adopting the convoluted partner/competitor/systemic rival framework. Germany's declared posture on Russia is among the more serious with notable strategy deficiencies with China.



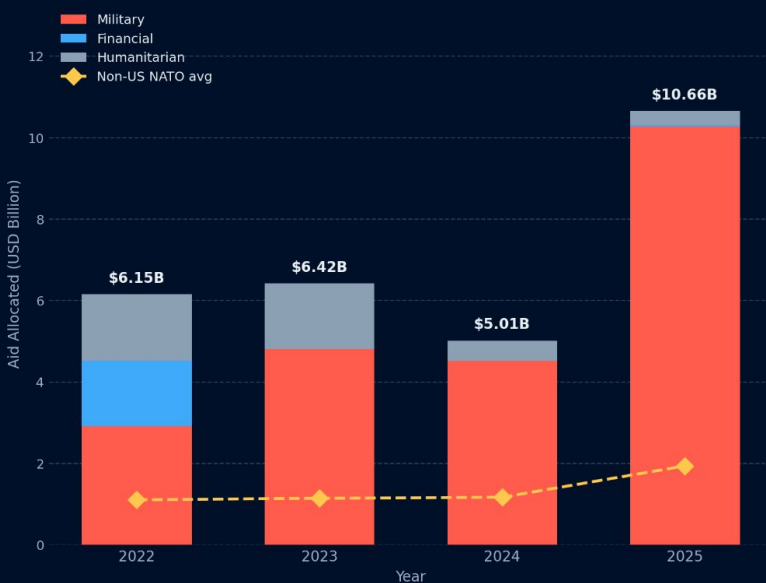
STRATEGIC ALIGNMENT

Ukraine Support

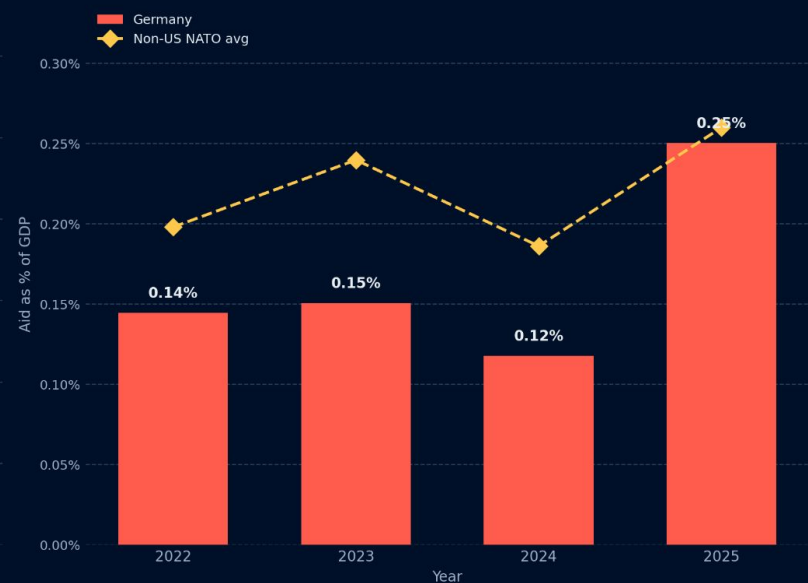
Germany is Ukraine's largest absolute military supporter in Europe, with €25.295B allocated and €47.232B committed (0.702% and 1.311% of GDP) though a €21.9B commitment gap, overwhelmingly military, remains the central concern. High-value contributions include Patriot systems, IRIS-T SLM and SLS platforms, Gepard anti-aircraft guns, 18 Leopard 2A6 tanks, Marder IFVs, PzH 2000 howitzers, MARS II MLRS, and substantial ammunition. The 2026 military aid trajectory is rising toward €11.5B. The most significant caveat is Taurus: Germany has declined to transfer its long-range cruise missile even after the UK and France delivered comparable systems, making it one of the most cautious major donors on strategic strike. A May 2025 joint long-range weapons production track inside Ukraine partially addresses the gap without resolving the political signal.

Germany — Ukraine Aid, 2022-2025

Germany: Aid to Ukraine by Type



Germany: Aid to Ukraine as % of GDP



STRATEGIC ALIGNMENT

Russian Decoupling

Germany [entered 2022](#) as Europe's most consequential Russian energy dependency case: roughly 55% of gas, one-third of oil, and a major share of coal came from Russia. The decoupling was fast and forced. [Nord Stream 2 certification](#) was suspended on 22 February 2022, Russian [pipeline gas stopped](#) flowing by late August 2022, and Germany rapidly built LNG [import terminals](#) at four locations. By 2025, German LNG [terminals supplied](#) around 10% of domestic gas consumption. Germany backed every EU sanctions package through the 20th and the Merz government has actively [pushed for stronger](#) use of frozen Russian assets for Ukraine. The residual concern is Russian-origin LNG still potentially entering European systems through Mukran/Rügen pending the EU phase out targeted for 2027. The prewar strategic misjudgment was severe; the post-2022 correction has been real but energy-intensive German industry continues to pay the price.



STRATEGIC ALIGNMENT

Public Support & Political Resilience

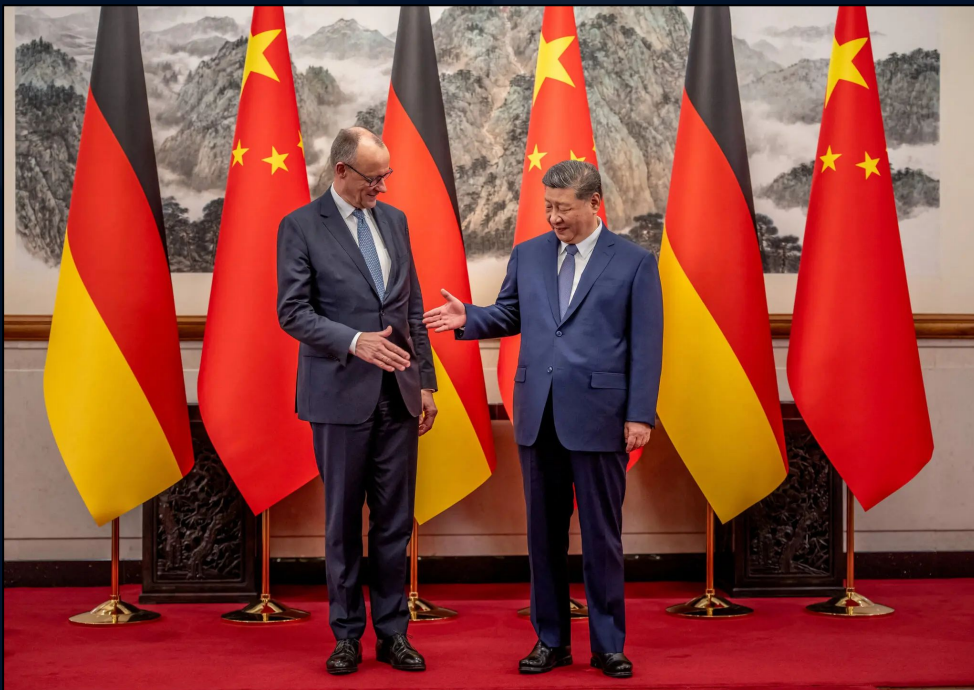
Seventy-seven percent of Germans [said in 2024](#) they would vote to stay in NATO, with 54% favoring increased defense spending, a significant shift from Germany's pre-2022 baseline. Sixty-five percent agreed Germany should defend another ally if attacked, and 62% agreed NATO membership makes a foreign attack less likely. The CDU/CSU-led government under Merz has committed to 3.5% direct defense plus 1.5% for the Hague 5% framework, marking a genuine strategic reorientation for the largest European economy, while the SPD accepted the formal policy shift but retains internal tensions over the pace of rearmament. The AfD is polling at roughly 20% nationally and running on a platform that could adjust German NATO policy if it came to power. The continued relevance of AfD puts the future of Germany's NATO orientation into question.



STRATEGIC ALIGNMENT

Hedging Behavior

Germany's hedging behavior record is broadly positive with one significant China concern. No Moscow visits by any chancellor since the full-scale invasion, no BRI participation, no adversary arms procurement, and FDI screening has been strengthened with Chinese semiconductor acquisitions blocked in 2022. The China liability is real. Scholz's [November 2022 Beijing visit](#)—the first by a G7 leader after COVID reopening—drew sustained criticism from European allies for the signal it sent at a critical moment in the war. COSCO holds a [24.99%](#) stake at the Port of Hamburg, restricted below a blocking minority but still a sensitive infrastructure exposure. Germany voted no on Chinese EV tariffs in October 2024, driven by auto-sector dependence on the Chinese market—a clear example of economic exposure constraining declared de-risking policy. 5G Chinese component phaseout is underway but slower than UK or Baltic standards. Germany's counter-alignment problem is not open alignment with Beijing but structural economic dependence that repeatedly pulls German policy softer than its declared posture on China.



STRATEGIC ALIGNMENT

Operational Cooperation

Germany contributed forces to [Afghanistan under ISAF](#) and participated in [coalition operations](#) in Iraq, though with significant caveats on combat rules of engagement that generated allied friction. Germany did not provide a kinetic contribution or basing support during Operation Epic Fury. The core operational value Germany provides is institutional and geographic. Ramstein Air Base, EUCOM and AFRICOM headquarters at Stuttgart, US Army Europe and Africa at Wiesbaden, and Landstuhl medical infrastructure make Germany the irreplaceable rear-area hub for all US and NATO operations across Europe, Africa, and the Middle East—infrastructure that cannot be quickly replicated elsewhere. The [Lithuania brigade](#), reaching roughly 4,800 soldiers by 2027, is Germany's most significant forward deployment in postwar history. Germany hosts NATO's NSATU at Wiesbaden, coordinating military equipment and training for Ukraine. Germany leads the European Sky Shield Initiative. Germany did not obstruct Operation Epic Fury, has participated in Operation Aspides since Feb 2024, and is prepping a possible Hormuz role but hasn't joined the UK-France Hormuz coalition. The operational profile is indispensable by virtue of what runs through German territory; cautious by virtue of what Germany declines to project beyond it.

